New Employee Checklist

This checklist is a helpful reminder of tasks that you will need to complete as a new employee. You can find this checklist (including helpful links) on the Human Resources tab of USBnet under Find it Fast → New employee resources.

Preparing for Your First Day

*Note: The first three items are **not** applicable to employees in Canada.*

- ❑ **View the New Employee Orientation Web Site** – This Web Site contains important information about U.S. Bank, including an introduction to our leaders, benefits, policies and much more. To access the Web site, you need:
  - a computer with sound and a high-speed Internet connection
  - Adobe Acrobat Reader – to view PDF documents
  - a printer to print required employment forms

  If you have problems viewing the NEO Web site, please refer to the New Employee Orientation Web Site FAQ, or contact your manager or HR representative for assistance.
- ❑ **Complete Required Paperwork/Provide Information** – Please follow the instructions and prepare to complete all four steps on the Forms and Information under Getting Started on the NEO Web site.
- ❑ **Gather Required Documents to Verify Your Identity** – The documents you need to provide are identified on the NEO Web site. You must bring original documents – copies of documents cannot be used for verification purposes.
- ❑ **Talk with Your Manager** – Determine where and at what time you should report following New Employee Orientation, and discuss the dress code for your workgroup.

Your First Day

- ❑ **Establish a U.S. Bank Employee Checking Account** – You may open an employee checking account. Employee checking accounts are free when you have your U.S. Bank pay direct-deposited. **Elavon employees, contact your local HR representative.**
- ❑ **Obtain Your Intranet ID and Password from Your Manager** – If your manager does not have your password, call the Service Center at 800-315-9088 to reset it. Choose option 1, and then option 2 to speak to a representative. **Elavon/Internet Secure employees**, contact your local HR representative.
- ❑ **Set Up Your QID and Security Questions** through the ResetMe tool on USBnet → Technical Support. Your QID is a unique 4-digit number used for authentication purposes and is required in order to reset your password through the automated system. Your QID is chosen by you, you may change it at any time, and it will never expire. Set up your security question in order to reset your Active Directory (Windows) password through the automated password system.
- ❑ **Log in to Employee Self Service on the Human Resources tab of USBnet** as soon as you receive your Intranet ID and password from your manager. When you log in, select *Self Service*. From the Self Service menu you will see three menus: Personal Information, Payroll and Compensation, and Benefits. The following pages need your immediate attention:
  - **Personal Information > Personal Information Summary:** Verify or update your personal data in the HR system:
    - 🇺🇸 (home address, phone number(s), emergency contact(s), date of birth, gender, race, veteran, disability status, languages, etc.)
    - 🇨🇦 (home address, phone numbers(s), emergency contact(s), date of birth, languages, etc).
  - **Personal Information > Submit I-9 Form:** Complete Section 1 of the electronic I-9 form if not previously completed.
  - **Payroll and Compensation > Direct Deposit:** Update your banking information to ensure you receive your semi-monthly pay in a timely manner.

- **Payroll and Compensation > W-4 Tax Information:** It is extremely important that you review your federal and, if applicable, state withholding information as soon as possible once your employment has started. Most withholding rules default to a single/0 status unless you elect otherwise. This will directly impact the amount of taxes withheld from your pay and impacts your year-end W-2.

❑ **Obtain Your U.S. Bank Lapel Pin** – Every U.S. Bank employee proudly wears a lapel pin to represent his or her commitment to the U.S. Bank Service Values.

❑ **Submit Required Paperwork** – Come prepared with completed paperwork.

❑ **Take Your Badge Picture** – Have your picture taken for an employee security badge, if applicable.

Your First Week

❑ **Ensure Required Paperwork is Completed** – Verification of Section 2 of your I-9 form must be completed in full no later than 7 p.m. CST on the 3rd consecutive business day of work (M-F). You will need to provide appropriate documentation to your manager or HR to verify your I-9. Please see the Lists of Acceptable Documents on the I-9 form located on the Forms and Information section of the NEO Web site. If you choose to present a document from List B, it must contain a photograph.

❑ **Familiarize Yourself with Resources Mentioned on the NEO Web Site, Including:**

- USBnet and www.USBankHR.com
- Employee Self Service (ESS)
- U.S. Bank Employee Service Center - 800-806-7009
- U.S. Bank Learning Center
- U.S. Bank Client Service Center - 800-315-9088

❑ **Determine Your 401(k) Election if You are Eligible for Benefits**

▸ You have five business days after your hire date to opt out of contributing 2% of your pay in the U.S. Bank 401(k) Savings Plan. If you miss this deadline, you can still make changes or suspend contributions at any time, but contributions already made must remain in the plan. Log on to www.yourbenefitsresources.com/usbank, or call the U.S. Bank Employee Service Center, and select the 401(k) option.

▸ You are eligible to participate in the U.S. Bancorp Employee Savings Plan after six months of service. An enrollment kit will be mailed to your home address.

❑ **Enroll in Benefits**

▸ If you are benefit-eligible, it is important for you to enroll in benefits by the deadline listed on your enrollment worksheet, or you will automatically be enrolled in the Default Program of Benefits.

▸ A Sunlife enrollment packet will be provided to you.

❑ **Add Dependents**

▸ It is important to add your dependents (i.e., spouse, children, domestic partner, or dependents of domestic partner) before you enroll in your benefits by calling the U.S. Bank Employee Service Center. You will be required to provide proof of eligibility for dependents at a later date.

▸ When completing your Sunlife enrollment forms, be sure to include your dependents.

❑ **Child Support Orders**

▸ If you have a child support order, please contact the agency and have them forward paperwork to:

ATTN: Payroll/Garnishments
EP-MN-R4PR
4000 W Broadway
Robbinsdale, MN 55422
or fax to 763-971-1180

❑ **Designate Other Language** – Self-identify any language in which you are fluent or conversational in the bilingual database via Employee Self Service.

After Your First Week

❑ **View Your Online Paycheck/Pay Cheque** – Printed paychecks/pay cheques are suppressed by default for direct deposit accounts. You can conveniently access your paycheck online beginning two days prior to each payday. Simply access Employee Self Service. Two years of past paychecks are viewable and printable online. **Note:** Employees in California, Delaware, Maine, Maryland and Oregon should elect to suppress their printed paycheck, or you will continue to receive a paper pay statement, in accordance with state law.

❑ **Review Your 401(k) Election**

- If you were automatically enrolled in the 401(k) Savings Plan at the default 2% contribution rate, you may wish to review your contribution rate and investment options to ensure you will meet your retirement goals. You can review and change your plan elections at http://www.yourbenefitsresources.com/usbank.
- You are eligible to participate in the U.S. Bancorp Employee Savings Plan after six months of service. An enrollment packet will be mailed directly to your home address.

❑ **Complete the "Code of Ethics and Business Conduct with Certification" course, and Certify Your Compliance with the U.S. Bank Code of Ethics and Business Conduct Within 30 Days of Your Start Date**

- To complete the training and certify your compliance, access the online **"Code of Ethics and Business Conduct with Certification" course,** found on your "My Learning" page of the **U.S. Bank Learning Center**. When you have successfully completed the course, you will see instructions for certifying your compliance with the U.S. Bank Code of Ethics and Business Conduct. If you do not have access to the U.S. Bank Learning Center, please work with your manager or HR representative.
- Contact your local HR representative.

❑ **Complete Remaining Online Training Through the U.S. Bank Learning Center**

❑ If you do not have access to the U.S. Bank Learning Center, please work with your manager or HR representative. You must complete a series of Web-based training courses within **your first 90 days**. See the **Training Links** page (http://usbnet/tools/training/) on the Intranet for more information related to required training.

❑ **Learn About Your Local Development Network**

- Review the calendar of upcoming events on USBnet and learn how you can get involved.

❑ **Review Emergency Preparedness with Your Manager**

- Discuss what special procedures or duties are required of you, such as shutdown procedures or critical notifications
- Discuss where you would find resources regarding procedures for emergency preparedness
- Make note of your emergency exit, evacuation route and assembly area.

❑ **Talk with Your Manager About Other Important Items:**

- The expectations of your position
- Your work environment and co-workers
- Your training plan
- Your compensation and review schedule

❑ **Prepare for Your 90-Day Review** – Your manager will conduct a 90-Day Review. Be prepared to discuss your completion of the items on this checklist as part of your review.